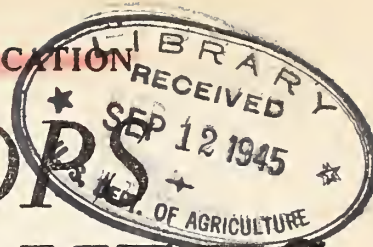


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# FOREIGN CROPS *and* MARKETS

UNITED STATES DEPARTMENT OF AGRICULTURE  
OFFICE OF FOREIGN AGRICULTURAL RELATIONS

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## LATE FOREIGN DEVELOPMENTS

PORTUGAL: 1942 grain acreage and production forecasts reported as follows, with approximate estimates for 1941 in parentheses: Wheat 1,310,000 acres (1,260,000), 23,883,000 bushels (15,432,000); rye 346,000 acres (309,000), 3,602,000 bushels (2,560,000); barley 173,000 acres (161,000), 1,768,000 bushels (1,493,000); oats 617,750 acres (370,000), 5,649,000 bushels (6,200,000). Crop prospects unusually favorable as a result of increased acreages, good weather conditions, and highly satisfactory germination.

INDIA: The fifth cotton report places the 1941-42 cotton crop for all India at 5,004,000 bales (of 478 pounds) from 23,547,000 acres compared with a fourth estimate of 4,869,000 bales and 23,245,000 acres and a final unrevised estimate of 4,841,000 bales and 22,902,000 acres for 1940-41.

BRAZIL: April declared exports of Brazil nuts to the United States from Belem and Manaos were 143 short tons shelled compared with 635 tons in April 1941. There were no declared exports of unshelled during the month as compared with 342 for the month in 1941. April shipments of shelled Brazil nuts made to other countries were as follows: Argentina 5 short tons, South Africa 30 tons, Canada 20 tons. Exports of unshelled were 98 tons to Argentina and 22 tons to South Africa. The market is reported as practically paralyzed due to the lack of shipping space.

Spot prices of medium-sized Brazil nuts at Belem, 100 milreis per hectoliter (about 5.41 cents per pound) and 125 milreis per hectoliter (about 6.77 cents per pound) for large washed at Manaos.

CORRECTION: On page 480 in the issue of May 4, the estimate of numbers of dairy cows in France in 1941 should have read 7,745,000 instead of 1,745,000.

\* \* \* \* \*

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G R A I N SUNION OF SOUTH AFRICA'S DEPENDENCE  
ON WHEAT IMPORTS INCREASED . . .

As a result of the severe drought experienced during 1941, the 1941-42 wheat crop of the Union of South Africa was reduced to 13,733,000 bushels, as compared with 15,600,000 bushels harvested in the previous year, according to information received in the Office of Foreign Agricultural Relations. The outturn of wheat during 1935-36 to 1939-40 averaged 16,624,000 bushels, when the apparent domestic utilization of wheat averaged 17,410,000 bushels. This indicates that about 3,700,000 bushels of wheat would be required during 1942, without taking into consideration a reported increase in annual domestic requirements, resulting from the war. Imports during 1941 are not available, but almost 3 million bushels were imported in 1940, following a crop of 15.3 million bushels. Small exports of wheat, mostly in the form of flour are usually reported, but these are likely to become even less significant, in view of the small crop reported for 1941-42.

UNION OF SOUTH AFRICA: Production, trade, and apparent  
utilization of wheat, 1935-36 to 1941-42

Year	Production	Wheat, including flour a/		Apparent utilization
		Imports	Exports	
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
1935-36 .....	23,709	68	177	23,600
1936-37 .....	15,990	39	1,197	14,832
1937-38 .....	10,723	2,644	210	13,157
1938-39 .....	17,388	204	218	17,374
1939-40 .....	15,310	2,987	210	18,087
Average ....	16,624	1,188	402	17,410
1940-41 .....	15,600	-	-	-
1941-42 .....	13,733	-	-	-

Compiled from official sources and report from American consul, Cape Town.

a/ Calendar year following harvest; flour converted to grain on basis of 1 barrel = 4.5 bushels.

In April 1941, a wheat commission was appointed to investigate the wheat industry. On the basis of a report made by the Commission, an increase in producers' prices was made by the Government. In order to keep living costs as low as possible, a subsidy amounting to about one million pounds (\$3,980,000) will be paid from the Treasury to avoid increasing the price of bread, which remains at about 6 pence (9.9 cents) per 2-pound loaf. It was estimated that without such subsidization, the retail price of bread would have been 0.5 pence (0.8 cent) per loaf higher.



# ARGENTINE STORAGE FACILITIES INADEQUATE FOR HEAVY GRAIN SUPPLIES . . .

With surplus grain stocks approximating 27.6 million short tons, Argentina's storage problem has become acute, according to information received in the Office of Foreign Agricultural Relations. Existing grain elevators, cereal warehouses, and other storage facilities are estimated to have a total capacity of only 12.7 million short tons, or less than half the space needed for current supplies. While most of the granaries and sheds are located in the important Buenos Aires and Rosafé Zones, they are fairly well distributed throughout the grain belt.

## ARGENTINA: Storage facilities for grain, 1942

Type and location	Zone				Total
	Rosafé	Buenos Aires	Bahia Blanca	Entre Riós	
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Interior -</u>					
Railway sheds ..	2,879,536	3,143,470	1,983,431	280,679	8,287,116
Camp elevators and granaries.	379,897	53,891	8,124	11,684	453,596
Mill elevators and sheds ....	408,795	123,313	52,370	57,202	641,680
Total interior .	3,668,228	3,320,674	2,043,925	349,565	9,382,392
<u>Ports -</u>					
Railway sheds ..	200,821	444,282	372,894	99,613	1,117,610
Government sheds and warehouses	19,290	164,513	45,415	78,906	308,124
Private sheds ..	130,941	313,009	123,017	38,680	605,647
Mill elevators and sheds ....	493,279	418,268	158,400	18,133	1,088,080
Terminal elevators ....	91,326	78,339	35,274	32,844	237,783
Total at ports .	935,657	1,418,411	735,000	268,176	3,357,244
Total storage.	4,603,885	4,739,085	2,778,925	617,741	12,739,636

National Grain and Elevator Commission.

The Argentine Government planned for the construction of about 250 elevators with a capacity of about 600,000 short tons, but the program is reported to be making slow progress as a result of rising prices and the difficulty in obtaining materials. With regard to 64 elevators planned for the new port of Buenos Aires, a recent press report stated that present conditions were unfavorable for the undertaking, since the scarcity of material and high prices would increase their cost to such an extent that storage fees would become burdensome. It was suggested that the construction of these new elevators be deferred and railroad freight



than that of the previous year and second only to the 1932-33 outturn, when because of low prices its value was less than two-thirds as high.

CHILE: Value of agricultural production of grains, 1935-1940

Grain	1935	1936	1937	1938	1939	1940
	Million pesos	Million pesos	Million pesos	Million pesos	Million pesos	Million pesos
Wheat .....	524.3	562.0	651.8	874.8	962.7	724.1
Feeding barley .....	24.0	29.3	41.8	75.8	35.3	20.4
Malting barley .....	18.4	25.1	26.5	46.3	29.8	13.6
Oats .....	26.2	45.6	50.1	73.0	66.8	30.7
Rye .....	3.2	3.1	4.7	5.8	6.5	3.7
Corn .....	35.0	32.0	46.8	42.9	50.5	56.8
Total .....	631.1	697.1	821.7	1,118.6	1,151.6	849.3
Value in United States currency	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
Total .....	32.1	35.7	42.5	57.8	59.6	43.9

Estadística Chilena.

BRAZIL RICE EXPORTS BEGIN . . .

The new rice crop in Rio Grande do Sul, the exporting State of Brazil, is reported to be somewhat above normal, amounting to about 15 million bushels. On account of the dry weather, harvesting began the latter part of March, about 2 weeks earlier than usual. The quality of the grain this year is reported to be very good. The first shipment of new-crop abroad was made on April 22 to England, consisting of about 2 million pounds. Exports of rice were prohibited from May 1941 until March 1942 on account of the reduced harvest last season.

About 94 million pounds of new-crop rice had been sold for export up to April 25, according to a report received from Porto Alegre. Of this quantity, more than half was sold to the United Kingdom, and Switzerland had purchased 26 million pounds. The third largest buyer was stated to be Cuba, where about 9 million pounds has been sold. Small quantities were also reported sold to the United States, Canada, Ireland, and Bolivia. The volume of exports for the 1942-43 season is uncertain, but some believe that if shipping space is available exports will be near a record level. There is some concern in Brazil, however, as to whether sufficient shipping space may be available. Exports from 1931 to 1940 varied from 43 to 199 million pounds. Rice prices have remained at a high level. At the end of March 1942, Blue Rose Extra was quoted at \$4.31 per 100 pounds compared with \$2.75 for the same date a year ago.



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VEGETABLE OILS AND OILSEEDSNIGERIAN PALM OIL AND KERNELS  
IN GREATER DEMAND . . .

The Nigerian palm-oil and palm-kernel market became unusually active early this year. Disruption of the Far Eastern trade in these commodities has gone far to strengthen the confidence of both producers and dealers. The prices fixed by the Government and now being paid are not considered by producers to be commensurate with the increased effort needed for the larger volume of production desired.

The price-control system in Nigeria is not flexible, as is evidenced by the low prices still being offered for agricultural commodities. The controlling authorities maintain that the purpose of the control is to make available to the native producers a larger portion of the increased prices obtained from the sale of these products. It appears, however, that the system is more favorable to the Government.

Palm-kernel exports amounted to 425,500 short tons in 1941, as compared with only 190,000 in 1940. Among the factors leading to this increase were the priority given in shipping space, the demand for military purposes, and the nullification of the order prohibiting exports of kernels. The price has also been increased from £4-7-6 to £5-7-6 per long ton (\$15.70 to \$19.32 per short ton).

Shipments of palm oil totaled only 143,000 short tons in 1941 as compared with 148,650 in 1940. While exports were smaller than in the previous year, the palm-oil market was much more satisfactory. There has been a heavy demand by military authorities, and this has resulted in better prices. Domestic consumption is much greater than in former years and will no doubt continue upward as long as the war lasts and the restriction on the importation of cooking fats is in effect.

The Nigerian Government does not publish stocks figures, but reliable trade sources estimate that approximately 81,000 short tons of palm kernels were on hand February 1, 1942. Stocks of palm oil amounted to 46,300 tons.

The trade in palm products has experienced disturbing fluctuations since the beginning of the depression in 1929, when prices were too low to interest people in cultivating the trees and harvesting the nuts. The fluctuations in trade cannot be entirely explained in terms of the depression. One important reason advanced by the Government at the time prices began to fall was the fact that the grade of palm oil produced in Nigeria was inferior to that produced in other countries, especially Sumatra. With this competition eliminated as a result of the war, Nigerian palm oil and kernels should not only be in greater demand, but should also bring better prices.

The Government has put forth the contention that most of the principal consumers, such as Germany and Italy, are no longer able to trade with Nigeria, so that this decrease in demand must react on the price. This is not entirely the case, as the loss of European markets has been offset by the increased demand from England and the United States.

ARGENTINE SUNFLOWER-SEED CROP  
LARGER THAN ANTICIPATED . . .

The first official estimate for the 1941-42 Argentine sunflower crop is placed at 1,477 million pounds, as compared with the corresponding estimate of 970 million pounds last year. This is considerably above the preliminary forecast made earlier in the season and is also above trade estimates. (See Foreign Crops and Markets, April 27, 1942.) Commercial stocks of sunflower seed on hand April 1, 1942, amounted to 182 million pounds, which was considerably larger than at the same time the year before, when only 97 million pounds were reported.

SWEDEN PLACES EMBARGO ON CERTAIN  
PRINTERS' INK AND OIL VARNISH . . .

On January 1, 1942, the Swedish Government placed an embargo on all stocks of specified printers' ink and oil varnish, totaling 5 kilograms (11 pounds) or more, which were owned by firms or individuals manufacturing or dealing in these commodities; as well as on stocks of these commodities that have been manufactured in or imported into Sweden since December 31, 1941, for other than Government account. Printers' ink to be used in the printing of newspapers and intaglio printing, which is not prepared with drying oil, is exempt from this Government embargo. All stocks of printers' ink for which an export license had been granted prior to January 1, 1942, are also exempt from this Government embargo.

Irrespective of quantity, all manufacturers of and dealers in printers' ink, were required to declare their stocks on hand as of January 1, 1942, to the State Industrial Commission. All other owners of stocks of printers' ink on which the Swedish Government has placed an embargo were required to declare their supplies exceeding 5 kilograms (11 pounds), to the State Industrial Commission not later than on January 10, 1942. A declaration of stocks of the above-mentioned commodities imported into Sweden after December 31, 1941, for other than Government account, was also to be submitted to the State Industrial Commission not later than 7 days after the date of arrival.

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C O T T O N - O T H E R F I B E R SCOTTON CROPS IN BRAZIL REDUCED  
BY UNFAVORABLE WEATHER . . .

The first official estimate placed the 1941-42 cotton crop in Southern Brazil at 1,496,000 bales (of 478 pounds), excluding the States of Paraná, Minas Geraes, and southern Bahia, for which last year's estimates totaled about 83,000 bales. The final 1940-41 estimate for Southern Brazil, released on the same date, was equivalent to 1,826,000 bales excluding Minas Geraes (second estimate showed 32,000 bales). The third estimate for Northern Brazil, also released on April 24, placed the 1941-42 crop at 482,000 bales, excluding northern Bahia (second estimate showed 12,000 bales). The final estimate for 1940-41 amounted to 650,000 bales. A summary of the above figures indicates a preliminary 1941-42 estimate for all Brazil of about 2,073,000 bales against the record crop of 2,508,000 bales in 1940-41.

The reduction in the 1941-42 estimate for Southern Brazil was attributed to excessive rains that fell just before and during the picking season, particularly around the middle of April. Picking was delayed and the quality of the São Paulo crop was reported to have deteriorated appreciably. Trade sources indicated at the time of this report (April 23) that if the rains continued another week or 10 days the São Paulo crop might not exceed 1,384,000 bales instead of 1,476,000 as shown in the official report. The 1941-42 São Paulo acreage was estimated at 1,190,000 acres against 1,258,000 in 1940-41 and 1,149,000 in 1939-40.

The reduction in Northern Brazil was attributed to a severe drought that has continued into the current season and threatens to reduce the 1942-43 crop, particularly in the interior, below the low level of 1941-42. These interior regions produce perennial cotton (sertao and seridô) that normally accounts for about 75 percent of the crop in Northern Brazil. The drought has not affected the coastal regions, where annual (matta) cotton is grown, but the 1942-43 acreage is expected to be lower than in 1941-42.

Cotton exports from Brazil in 1941 amounted to about 1,330,000 bales compared with 1,034,000 in 1940. Exports of cotton linters increased from 184,000 bales (of 478 pounds) in 1940 to 316,000 in 1941. Cotton textile exports also were increased from 8,726,000 to 20,366,000 pounds, respectively. Coastwise shipments of cotton from Northern to Southern Brazil during the 8 months ended February 28, 1942, amounted to 159,000 bales.

Cotton mills in Brazil have operated at record levels during most of the current season. Private sources believe that consumption for the year ending June 30, 1942, will reach about 784,000 bales compared with

estimates varying around 600,000 for 1940-41. Record exports of cotton textiles and yarns as well as increased domestic consumption were the chief reasons for high mill activity.

BRAZIL: Estimated cotton consumption by growths and States,  
July 1, 1941, to June 30, 1942  
(In bales of 478 pounds net)

Consuming district	Growth		
	São Paulo	Northern	Total
	<u>Bales</u>	<u>Bales</u>	<u>Bales</u>
São Paulo .....	242,000	69,000	311,000
Federal District .....	27,000	74,000	101,000
Rio de Janeiro (State) .....	39,000	29,000	68,000
Minas Geraes .....	99,000	14,000	113,000
Santa Catharina and Rio Grande do Sul .....	2,000	18,000	20,000
Bahia .....	-	-	19,000
Northern Brazil .....	-	138,000	138,000
Others .....	-	-	14,000
	409,000	342,000	784,000

Compiled from trade sources.

Carry-over of São Paulo cotton on March 1, 1942, was estimated unofficially at 489,000 bales compared with 231,000 a year earlier. No estimate is available for Northern Brazil cotton, but by considering the low 1941-42 crop of about 494,000 bales, estimated consumption in all Brazil of about 345,000 bales, and exports of around 150,000 bales during the year ended February 28, 1942, it appears that stocks (on March 1, 1942) were about equal to last year's private estimate of 140,000 bales.

Spot prices of São Paulo type 5 cotton at São Paulo increased from 47.5 milreis per arroba (7.73 cents per pound) on March 20 to 55.25 milreis (8.99 cents) on April 20. The increase was most pronounced in cotton of type 5 or better and was attributed to the relative scarcity of good-quality cotton from the current crop because of damage from excessive rain. Prices of the lower grades increased slightly in sympathy with those for higher grades - from 7.00 to 7.24 cents in the case of type 7. Type 5 Matta and Sertao cotton were quoted at Pernambuco on April 20 at 43 milreis (7.00 cents) and 56 milreis (9.11 cents) respectively.

A decree-law issued on March 30, 1942, authorizes the Bank of Brazil to grant loans on the 1941-42 São Paulo crop based on 50 Milreis (8.14 cents) for type 5 lint and 15 milreis (2.44 cents) for seed cotton.



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T O B A C C O

## INDIA HAS RECORD FLUE-CURED TOBACCO CROP . . .

The 1941-42 production of flue-cured tobacco in India that was harvested and marketed between January and April 1942 is estimated to have totaled about 57 million pounds as compared with the previous record crop in 1940-41 of 49 million pounds. Prices for the leaf averaged about 8.7 cents (4.7 annas) per pound, which was somewhat below the average of 1940-41 prices, according to information received in the Office of Foreign Agricultural Relations.

Preseason expectations indicated that the 1941-42 flue-cured area would be substantially below that of the preceding year, but actual plantings are reported to have totaled approximately 145,000 acres as compared with revised estimates indicating a 1940-41 area of between 125,000 and 130,000 acres. The increase in area occurred in new producing districts that have developed in recent seasons. Plantings in the principal district around Guntur, where preseason efforts were made to obtain a sharp reduction in area to check the spread of "tokra" (a parasitic weed attaching itself to the root of the growing plant), were about equal to those of 1940-41.

Weather conditions during the growing season in the principal producing districts were unfavorable, but expectations prior to harvest indicated a somewhat higher outturn than the low yield in 1940-41. The entry of Japan into the war, however, closed the market for most of the low-grade leaf and growers air-cured a larger part of the inferior grades, with the result that yields of the portion of the crop actually flue-cured were below those of 1940-41.

Uncertainties regarding exports from India brought on by the war resulted in less competition in buying than has occurred in recent years. Most of the crop was purchased by the British-owned Indian Leaf Tobacco Development Company, Ltd., at prices below those for the 1940-41 crop.

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UNITED KINGDOM RESTRICTS  
CONSUMPTION OF AMERICAN LEAF . . .

It is reported that since April 1 (following an agreement among the British Board of Trade, the Tobacco Control Board, and the Tobacco Manufacturers' Council) British customs authorities have been restricting the clearances of American and other foreign tobaccos under license, in favor of Empire leaf, stocks of which are said to be relatively large in proportion to their consumption.

During the year ended March 1942, manufacturers were entitled to increase their clearances of tobacco, regardless of source, to 108 percent of clearances made in the base year ended March 1940. For the months of April and May, however, clearances of American and other foreign leaf will be restricted to only 95 percent of the base year, while the difference (13 percent) must be added to the clearance of Empire tobacco; and from June 1, clearance of American and other leaf will be restricted to 90 percent, with the balance (18 percent) added to Empire tobacco.

For a firm that was using all foreign tobacco during the base year, the clearance ratio for April and May will be 88 percent foreign and 12 percent Empire; and from June 1 onward, the ratio will be five-sixths foreign and one-sixth Empire. These proportions must be maintained, even though the total clearance should fall below the permitted 108 percent of the base year.

The compulsory shift to Empire leaf can, in the interest of conserving shipping, be justified as a temporary expedient. Available information indicates that as a result of restricted imports of American leaf, present stocks in the United Kingdom are probably about 60 percent foreign leaf (mostly American) and 40 percent Empire, which are about the ratios set up for withdrawals for consumption in 1942-43. American growers, however, are concerned as to whether or not the recent measures will be limited to a temporary period. Reports from all of the important sources of Empire leaf suitable for use in the United Kingdom point to increased export supplies.

The 1941-42 production of flue-cured leaf in India reached a record total of 57 million pounds, from which it is estimated that 40 million might be exported. Southern Rhodesia which normally exports most of its production to the United Kingdom had record flue-cured crops of approximately 35 million pounds in both 1940 and 1941. In Canada the 1942 flue-cured acreage allotments were increased for the first time in 3 years to 100 percent of the record 1939 area that yielded approximately 80 million pounds. Canada's current consumption of flue-cured leaf is about 45 million pounds annually.

#### CHINA ESTABLISHES A TOBACCO MONOPOLY

The Chinese Government inaugurated a tobacco monopoly on May 1 under the Ministry of Finance of the National Government, according to reports from the official Chinese new agency. The monopoly has not begun active operation, however, but representatives have been sent to the various tobacco-producing areas to make investigations as a preliminary step toward the institution of the monopoly system.

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F R U I T S , V E G E T A B L E S , A N D N U T SEGYPTIAN 1941-42 CITRUS PRODUCTION  
BELOW PREVIOUS SEASON . . .

The 1941-42 preliminary production estimates of oranges, mandarins, limes, and sweet lemons in Egypt are all below those of the preceding season. The 1941-42 estimates are: Oranges 4,248,000 boxes, mandarins 5,106,000 boxes, limes 5,678,000 boxes, and lemons 107,000 boxes. These estimates may be compared with those of 1940-41 which were: Oranges 6,499,000 boxes, mandarins 13,110,000 boxes, limes 8,268,000 boxes, and lemons 130,000 boxes. The estimates of production for other recent years and the 1936-37 to 1940-41 average are shown in the following table.

EGYPT: Estimates of citrus production, 1936-37 to 1941-42 a/

Year	Oranges	Mandarins	Limes	Lemons
	<u>1,000 boxes</u>	<u>1,000 boxes</u>	<u>1,000 boxes</u>	<u>1,000 boxes</u>
1936-37 .....	3,619	12,264	5,126	77
1937-38 .....	3,826	7,365	6,867	80
1938-39 .....	5,618	15,335	7,015	109
1939-40 .....	4,193	5,621	5,779	74
1940-41 .....	6,449	13,110	8,268	130
Average .....	4,741	10,739	6,611	94
1941-42 .....	4,348	5,106	5,678	107

Compiled from consular sources.

a/ Oranges, lemons, and limes, 200 per box; mandarins, 84 per box.

The decline in production is mainly attributed to the period of exceptionally strong hot winds that prevailed from the middle of May until about June 10, 1941, and had a detrimental effect on the budding. There was also some damage reported from the increase in fruit pests during the season. The prospects for a better production in 1942-43 are said to be good, although it is too early to make reliable forecasts.

The disposal of citrus during the year 1941 was for all practical purposes entirely within Egypt itself. The export market has been cut off because of the war, and the Government, early in 1941, announced the suspension of the export bounty which had been in effect since 1933. The large body of British and other troops in the country made it possible to dispose of the entire production within the country. This situation resulted in the growers remaining on a sound basis for the year.



The Egyptian growers were still protected by the 1933 protective tariff on imported citrus fruits, which prevents citrus fruits in excessive quantities from nearby countries from competing with domestic fruits. The Egyptian Government lowered the import duty of Palestine oranges for the month of April 1942 only, from 75 to 40 piasters per quintal (\$1.40 to \$0.75 per 100 pounds) gross weight, to take care of the demand for oranges when domestic fruit was not available.

The imports made during 1941 were almost entirely of grapefruit from Cyprus and Palestine. The grapefruit from these areas are said to be superior quality to those of Egypt. There were a few oranges imported from Palestine; however, the quantity was insignificant. It is reported that efforts are being made to find ways and means of increasing exportation to the Sudan by obtaining lower freight rates on the Sudan Railways.

The following prices prevailed in the wholesale fruit market in Cairo on February 1, 1942.

	United States Dollars
Large 1st quality oranges .....	1.44 - 1.65 per 100
Ordinary oranges .....	0.49 - 0.65 " "
Mandarines .....	0.28 - 0.53 " "
Sweet lemons .....	0.45 - 0.90 " "
Grapefruit .....	2.06 - 2.47 " "

These prices were from 5 to 10 percent higher than on the same day in 1941.

#### MEXICAN FRESH VEGETABLE EXPORTS TO THE UNITED STATES CONTINUE IN GOOD VOLUME . . .

The shipment of Mexican fresh vegetables to the United States through Nogales during the period April 1-15, 1942, was in larger volume than during the same period in 1941 notably in the case of tomatoes and green peppers. The export of eggplants during the period showed a decline from that for the same period during the preceding two seasons.

The 1941-42 season's export through April 15 totaled 114,998,836 pounds as compared with 91,791,310 pounds for the same period in 1940-41 and 33,205,210 in 1939-40. The exportation of tomatoes showed a 24-percent increase over that of the 1940-41 season and green peppers increased 78 percent, while green peas showed a 58-percent decline and eggplants a 41-percent decline.



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MEXICO: Comparative exports of fresh vegetables, beginning  
of season to April 15, 1940-1942

Kind of vegetable	Beginning of season to April 15		
	1940	1941	1942
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
Tomatoes .....	25,861	81,673	101,416
Green peas .....	2,649	2,877	1,197
Green peppers .....	4,373	6,789	12,084
Green beans .....	1	-	38
Eggplants .....	321	451	264
Squash .....	-	1	-
Lima beans .....	-	-	-
Total .....	33,205	91,791	114,999

Compiled from consular sources.

The above quantities of vegetables were shipped in carload lots as follows:

MEXICO: Shipments of vegetables to the United States,  
beginning of season to April 15, 1940-1942

Kind of vegetable	Beginning of season to April 15		
	1940	1941	1942
	<u>Cars</u>	<u>Cars</u>	<u>Cars</u>
Tomatoes .....	1,245	3,927	4,813
Green peas .....	130	162	91
Green peppers .....	163	284	511
Green beans .....	-	-	1
Eggplants .....	1	2	1
Mixed .....	58	74	38
Total .....	1,597	4,449	5,455

Compiled from consular sources.

The peak of the tomato shipments from Mexico to the United States and Canada for the season was reached during the first half of April. It is anticipated that the exports will show a rapid decline and probably cease entirely by the middle of May, when Texas tomatoes are expected to start rolling to market.

Aside from the usual spring heat, which has affected the pepper crops to a considerable extent, growing conditions in the west coast district have been favorable. The quality of green peppers dropped noticeably during the first half of April and it was expected that shipments would end by the first of May.

NEW ZEALAND GOVERNMENT AMENDS  
DRIED FRUIT IMPORT  
LICENSING SCHEDULE . . .

The Customs Department of the New Zealand Government on April 9, 1942, announced the following amendments to the import-licensing schedule for the sixth licensing period:

"Dried Prunes (ex Tariff Item 36/1): Licenses for imports of dried prunes from the United States of America during 1942 may be granted for amounts equivalent to the amounts of licenses granted for imports of similar goods from all sources during 1941.

"Dried Apricots or Peaches (ex Tariff Item 36/4): Sixth Period licenses granted for imports of dried apricots or peaches from Australia or British South Africa may be amended, if desired, to permit of the importation of the goods from the United States of America."

The following table shows exports from the United States to New Zealand during the past 5 years and the first 3 months of this year of the dried fruits affected by the above amendments.

UNITED STATES: Exports of dried apricots, peaches, and prunes to New Zealand, 1937-1941, January-March 1942

Calendar year	Apricots	Peaches	Prunes
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
1937 .....	225,021	207,264	2,174,448
1938 .....	360,352	493,883	2,595,667
1939 .....	132,657	223,899	2,519,560
1940 .....	46,893	34,715	2,140,951
1941 .....	32,020	58,900	1,957,617
Average .....	159,389	203,732	2,277,649
1942 a/ .....	0	50	2,800

Compiled from official sources.

a/ January-March only.

The exports of dried fruit to New Zealand during the first 3 months of 1942, as may be seen from the above table, have practically come to a standstill due to the scarcity of shipping space and other war-time restrictive measures. The amendments, while permitting the importation of an amount equivalent to that of 1941, may not be of much practical benefit to the American exporters due to the present lack of ships to carry the freight to New Zealand.

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L I V E S T O C K   A N D   A N I M A L   P R O D U C T S

CANADA FULFILLS FIRST HALF OF  
1941-42 BACON AGREEMENT . . .

Canada supplied in the first half of the 1941-42 contract period (October-September), 326 million of the 600 million pounds of Wiltshire sides and other cuts promised the United Kingdom. It will be necessary to slaughter 2,283,000 hogs in the remaining half of the contract period (April-September) and in addition 984,000 hogs for domestic consumption. This will be fully 25 percent more than was slaughtered under inspection in the last half of the preceding contract year. It is expected, however, that this increase will be realized.

Present indications are that inspected slaughter of hogs in Canada during the year that began December 1, 1941, will total slightly over 7 million head, according to a report from Agricultural Attaché C. C. Taylor. This estimate is based on the number of hogs on hand on December 1, 1941, the number bred to farrow this spring and the course of marketings last winter.

The slaughter goal for the year, as announced by the Agricultural Supplies Board, is 7,500,000 head. This number must be reached in order to meet domestic requirements and allow 600 million pounds of bacon and other cuts for the supply of the British market. In order to obtain this objective it is necessary (1) to increase the number of sows bred this spring by 20 percent instead of 10 percent, as estimated formerly, (2) to save as many of the pigs farrowed as possible, (3) to breed sows twice yearly, and (4) to market hogs at a live weight of 200 to 210 pounds. The Bacon Board has already ordered that on and after March 2, 1942, no person slaughtering under Dominion inspection for domestic consumption as well as for export shall kill hogs weighing less than 130 pounds dressed carcass weight. A weekly tolerance of 1 percent on carcasses weighing less than that amount is granted to provide for the slaughter of light weight or unthrifty hogs. This restriction was imposed on exporting packers on December 4, 1941. The weight of dressed carcasses slaughtered in exporting houses during the week of March 7 averaged 5 or 6 pounds more than in February or in November 1941. If continued during the next 6 months this extra weight would increase production by 15 million pounds.

The use of wheat for feed may be diminished after next August when the price will be increased 20 cents a bushel. Large quantities, however, are expected to be fed in those areas where an acre of wheat produces yields having a higher feeding value than an acre of oats or barley. During the 3 years 1938-1940, it is reported that average yields in Western Canada, in terms of digestive nutrients per acre, were 926 pounds for wheat, 853 pounds for barley, and 672 pounds for oats. Experimental results obtained in Manitoba show that 100 pounds of wheat fed to bacon



hogs produced as large a gain in meat as 111 pounds of barley. It was announced that in the interest of economical bacon production the feeding of oats should be limited to the needs of brood sows and young pigs.

The Anglo-Canadian Bacon Contract for the year 1941-42 runs from October 6, 1941, instead of beginning on November 1 as in other war years. The Board estimated that about 3,500,000 hogs would be slaughtered between October and March 1942 but that during April-September a considerable increase would occur above the 2,600,000 head slaughtered in that period a year ago. As a matter of fact in the first half of the agreement year, October-March, 3.66 million head were slaughtered, and killings are likely to be about as large during April-September.

Domestic consumption of pork has been restricted in order to ship as much as possible to the United Kingdom. The Bacon Board restricted packers' deliveries for domestic consumption on July 23, 1941, to 75 percent of the average weekly deliveries for domestic consumption during 1940. These restrictions do not apply to slaughtering by farmers or by local butchers, nor to heads, trimmings, or other unexportable products. Pork consumption in Canada reached 644 million pounds in 1940 against 536 million in 1938. In view of the increased slaughtering in 1941, consumption probably reached 600 million, but a large proportion must have consisted of products not suitable for export. Consumption in 1942 is expected to continue at the same rate.

Exports of live hogs and edible pork products to countries other than the United Kingdom and British Possessions have been prohibited since July 23, 1941. Exports to Newfoundland and the British West Indies are always relatively small. Imports into Canada continue small due to high prices in the United States. Beginning in April 1942, the Bacon Board began paying as much for export Wiltshire sides weighing 70 to 75 pounds as for those weighing 65 to 70 pounds, thus abandoning the discount of \$1.00 per 100 pounds on that portion of the 70 to 80-pound category.

During the week ended April 18, of the hogs graded in Canada, 47.2 percent fell within the bacon type B-1 grade, against only 45 percent a year earlier. The price paid by the Bacon Board for bacon from this type of hog, in accordance with the agreement with the United Kingdom, is \$17.18 per 100 pounds of Wiltshire sides (\$18.90 Canadian), whereas the price paid for sides weighing 70-80 pounds was only \$16.27.

#### EXPORTS OF SHEEPSKINS FROM MONTEVIDEO INCREASE . . .

Exports of dry sheepskins from Montevideo, the principal Uruguayan seaport, increased nearly 14 percent during the period August 1, 1941, to



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March 31, 1942, compared with the same period of 1940-41, and increased nearly 270 percent when compared with the same period in 1939-40. The United States, since the outbreak of the war in Europe, has become the largest importer of Uruguayan sheepskins. Prior to the war, most of Uruguay's exports of sheepskins went to continental Europe.

URUGUAY: Exports of dry sheepskins from Montevideo, August 1, 1941, to March 31, 1942, with comparisons a/

Country of destination	August 1 - March 31		
	1939-40	1940-41	1941-42
United States -			
Pieces .....	60,100	723,900	712,800
Pounds .....	300,500	3,619,500	3,564,000
Brazil -			
Pieces .....	-	1,200	99,100
Pounds .....	-	6,000	495,500
Sweden -			
Pieces .....	1,500	-	8,900
Pounds .....	7,500	-	44,500
United Kingdom -			
Pieces .....	16,600	3,700	5,500
Pounds .....	83,000	18,500	27,500
Argentina -			
Pieces .....	-	-	1,000
Pounds .....	-	-	5,000
Venezuela -			
Pieces .....	-	-	400
Pounds .....	-	-	2,000
France -			
Pieces .....	94,900	-	-
Pounds .....	474,500	-	-
Italy -			
Pieces .....	51,500	-	-
Pounds .....	257,500	-	-
Total -			
Pieces .....	224,600	728,800	827,700
Pounds .....	1,123,000	3,644,000	4,138,500

a/ from commercial sources received in Office of Foreign Agricultural Relations. The original data were given in numbers of bales and were converted by using the following: 100 skins per bale, 5 pounds per skin.

In the past, New Zealand and Australia have been large suppliers of woolled sheepskins to the United States, but in the first 11 months of 1941 the export from New Zealand of sheepskins with wool dropped in number to one-third of that of the corresponding period of 1940. In case supplies of sheepskins from New Zealand and Australia are not available, the entire sheepskin import requirements of the United States probably could be filled by Latin American countries, of which Uruguay ranks high in production.

SHEEP. - AND LAMBSKINS: Production in specified Latin American countries, average 1934-1938, annual 1940-and 1941

Country	Average 1934-1938	1940 (preliminary)	1941 (estimated)
	1,000 pieces	1,000 pieces	1,000 pieces
Argentina .....	9,720	11,100	a/ 11,500
Uruguay .....	3,705	b/ 4,000	b/ 4,500
Chile .....	2,850	-	2,366
Brazil .....	2,199	c/ 2,191	c/ 2,600
Bolivia .....	2,000	-	-
Peru .....	1,618	1,572	1,440
Mexico .....	650	718	628

United States Tariff Commission, official and trade statistics.

a/ Estimate based on slaughter for first 10 months compared with the same period of 1940. b/ Rough estimate - large percentage of slaughter occurs on farms for local consumption and no official estimates available - varies from 1,600,000 to 2,900,000 and is usually large when commercial slaughter is small, as it was in 1941. c/ Exports plus domestic consumption.

AUSTRALIAN WOOL PRODUCTION  
ESTIMATES REVISED . . .

Australian wool production in 1941-42 will probably reach 1,140 million pounds, an increase of 2 percent above the revised official estimate of 1,115 million pounds produced in 1940-41. All of these figures are subject to further revision. Production in the five seasons 1935-36 to 1939-40 averaged 1,018 million pounds.

AUSTRALIA: Production of shorn and pulled wool and  
wool exported on skins, 1936-37 to 1941-42

State	July-June					
	1936-37	1937-38	1938-39	1939-40	1940-41	1941-42
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
New South Wales.....	505.4	496.8	439.1	548.5	535.0	a/
Victoria .....	163.0	178.9	165.8	179.1	185.1	a/
Queensland .....	153.8	174.8	179.5	195.8	a/	a/
South Australia ...	76.6	86.6	102.9	105.3	107.0	a/
Western Australia .	69.9	70.7	78.8	80.7	a/	a/
Tasmania .....	14.1	15.6	17.5	18.3	18.0	a/
Northern Territories	b/	b/	b/	b/	b/	a/
Total .....	982.8	1,023.4	983.6	1,127.7	c/ 1,115.0	d/ 1,140.0

Compiled from official sources. a/ Not available. b/ Less than 50,000 pounds. c/ Includes estimates for Queensland and Western Australia. d/ Preliminary estimate of the National Council of Wool Selling Brokers.

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GENERAL AND MISCELLANEOUSARGENTINE GOVERNMENT CHECKSRISE IN FOODSTUFFS PRICES . . .

Concerned over the continued rise in prices of foodstuffs, the Argentine Government has acted to forestall profiteering and further price increases, according to information recently received in the Office of Foreign Agricultural Relations. At a Cabinet meeting on April 16, the Government decided upon (1) strict enforcement of existing measures for the prevention and punishment of profiteering; and (2) the establishment of Government-controlled retail meat-selling establishments in consuming centers. Consideration also was given to a general plan for allocating hold space on Argentine ships, to insure the country's basic foreign trade requirements; and to the question of fixing maximum food prices.

In recent weeks, profiteering and speculative actions, among other factors, have aggravated the problem of rising foodstuffs prices. This has occurred despite efforts on the part of the Minister of Agriculture to provide adequate supplies and to fix maximum prices for a number of products. This, in brief, was the basic situation which prompted the Cabinet on April 16 to decide upon a rigid enforcement of the Supplies Law (No. 12,591) of September 8, 1939.

This law, enacted shortly after the outbreak of war with a view to curbing and controlling the sharp price advances experienced at that time, had not been enforced since July 1940, as the first temporary need for its application had disappeared within a few months after its passage. Popularly known as the Anti-Speculation Law, this measure clapped a ceiling on retail prices of all foodstuffs, at the level that prevailed during the first 2 weeks of August 1939. The Government is now committed to a rigid enforcement of this law, involving heavy fines on grocery stores, bakers' shops, and wholesalers for quoting prices or for selling goods at prices in excess of the Government-authorized maximum.

In addition to strict enforcement of the Anti-Speculation Law and with a view to preventing a further rise in the existing excessive prices of meat - a large item in the diet of the average Argentinean - the Cabinet decided upon the immediate opening of 20 retail establishments wherein meat was to be sold directly to the consuming public. These semi-official establishments were to be set up through the Argentine Corporation of Meat Producers, preferably in areas of dense population and relatively low purchasing power that had been especially affected by excessive meat prices. The belief was prevalent officially that this measure might make meat available to consumers at prices ranging around 20 percent below existing retail prices. Prior to this action of the Cabinet but contributing to the same end, the Municipality



of Buenos Aires had authorized the free entry of meat into the city in half carcasses weighing not less than 330 pounds. It also had provided for the setting up of 100 municipal stands for the sale of mutton. These municipal moves by the City of Buenos Aires were expected to have a favorable influence on consumer meat prices, the former by insuring a larger entry of meat into the city market.

The general plan for the distribution of the hold space in Argentine ships, covering inbound and outbound shipments, was not completed by the Cabinet in its discussions on April 16. The understanding was, however, that it would be completed within a few days and that it would be signed by all the Ministers, indicating unanimous adherence to the plan. Under it, the total available Argentine tonnage would be allocated among the various items of trade in proportion to their relative importance in the nation's economy.

#### FOREIGN EXCHANGE . . .

EXCHANGE RATES: Average value in New York of Chinese, Japanese, and some European currencies, last full month rates available a/

Country	Unit	Month	Value in United States currency
			Cents
Belgium . . . . .	Belga . . . . .	April 1940 . . . . .	16.89
Denmark . . . . .	Krone . . . . .	March 1940 . . . . .	19.31
France . . . . .	Franc . . . . .	May 1940 . . . . .	1.85
Germany b/ . . . . .	Reichsmark . . . . .	May 1941 . . . . .	39.97
Greece b/ . . . . .	Drachma . . . . .	September 1940 . . . . .	0.66
Italy b/ . . . . .	Lira . . . . .	May 1941 . . . . .	5.09
Netherlands . . . . .	Guilder . . . . .	April 1940 . . . . .	53.08
Norway . . . . .	Krone . . . . .	March 1940 . . . . .	22.71
Portugal . . . . .	Escudo . . . . .	May 1941 . . . . .	4.00
Spain b/ . . . . .	Peseta . . . . .	May 1941 . . . . .	9.13
Sweden . . . . .	Krona . . . . .	May 1941 . . . . .	23.84
Switzerland . . . . .	Franc . . . . .	May 1941 . . . . .	23.20
China b/ . . . . .	Yuan (Shanghai). . . . .	June 1941 . . . . .	5.34
Japan . . . . .	Yen . . . . .	June 1941 . . . . .	23.44

Federal Reserve Board. a/ Noon buying rates for cable transfers. Last daily rate reported on April 8, 1940, for the Danish and Norwegian kroner, now officially equal to 0.52 and 0.60 reichsmarks respectively; on May 9, 1940, for the belga and guilder, now officially equal to 0.40 and 1.33 reichsmarks respectively; on June 15, 1940, for the French franc, now officially equal, in the occupied area, to 0.05 reichsmarks; on October 26, 1940, for the drachma; on June 14, 1941, for the other European countries; and on July 26, 1941, for the yen and yuan (Shanghai). b/ Quotations nominal.



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EXCHANGE RATES: Average value in New York of specified currencies,  
May 2, 1942, with comparisons a/

Country	Monetary unit	Year 1941	Month				Week ended		
			1940	1941	1942		1942		
			March	March	Feb.	March	April: 18	April: 25	May 2
		Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Argentina <u>b/</u>	Paper peso	29.77	29.77	29.77	29.77	29.77	29.77	29.77	29.77
Australia <u>c/</u>	Pound	321.27	299.50	321.30	321.50	321.50	321.50	321.50	321.50
Brazil <u>d/</u>	Milreis	5.07	5.03	5.06	5.14	5.14	5.14	5.14	5.14
British India	Rupee	30.14	30.18	30.14	30.12	30.12	30.12	30.12	30.12
Canada <u>c/</u>	Dollar	87.32	82.88	84.98	88.42	87.66	87.00	87.44	88.08
Mexico <u>e/</u>	Peso	20.54	16.65	20.53	20.56	20.47	20.57	20.57	20.57
New Zealand	Pound	322.54	300.72	322.55	322.78	322.78	322.78	322.78	322.78
South Africa	Pound	398.00	398.00	398.00	398.00	398.00	398.00	398.00	398.00
United Kingdom <u>c/</u>	Pound	403.18	375.91	403.19	403.50	403.48	403.49	403.50	403.50

Federal Reserve Board.

a/ Noon buying rates for cable transfers.

b/ Official, regular exports. The special export rate of 23.70 cents, reported beginning March 27, 1941, applies to exchange derived from certain minor exports (e.g. dairy products) to certain countries (e.g. United States), such exchange formerly having been sold in the free market. Quotations nominal.

c/ Free. Official rates: Australia 322.80 cents; Canada 90.91 cents; United Kingdom 403.50 cents. Most transactions between these countries and the United States must take place at the official buying and selling rates.

d/ Free. Since April 10, 1939, 30 percent of the exchange derived from exports must be turned over at the official buying rate of 6.06 cents, the weighted average value of the milreis being 5.37 cents in 1941, 5.42 cents in March 1942 and 5.42 cents in the week ended May 2, 1942. Quotations nominal.

e/ Quotations nominal for 1940 and 1941.

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